Using REDCap Survey Functionality in Person (i.e., in a clinic)

Use these instructions for information on administering a survey to a participant in person. For example, in a clinic setting where you will hand the participant an iPad to do the survey.

These instructions assume that the first instrument in the project is not set up as a survey. Typically this it may be that demographics or other information entered by the study team prior to the participant’s visit.

- From the Record Status Dashboard, locate the participant record
- Click the dot for the instrument that you want the participant to complete (should not have a color)
- Once the instrument is open, click on Survey Options (far right)
- Select Log out + Open Survey
- This will simultaneously log out the current user and open the survey
- At this point, you may hand the iPad over to the participant.
- When they have completed the survey, they may hand it back.

The Log out and Open Survey function is used so that when the participant receives the iPad, the only access they have to REDCap is the survey. If you don’t do the logout step, they will have the access of the user that is logged in to REDCap, **which could include viewing other participants’ data.**